

RPPT 15TH ANNUAL SPRING SYMPOSIA 2004

CASE MANAGEMENT AND DOCUMENT MANAGEMENT FOR THE ESTATES LAWYER

MICROSOFT OUTLOOK AND AMICUS ATTORNEY AS CASE MANAGEMENT TOOLS

Peter Roberts¹
Practice Management Advisor
Washington State Bar Association

OUTLINE

1. Introduction

The use of technology engenders possible risk of malpractice and simultaneously offers lawyers opportunities to avoid malpractice claims. Technology impacts a lawyer's practice and demands that processes and procedures are implemented to protect against the risks inherent in the use of technology. **Case management software** is one of the best tools available to lawyers for better practice management and the prevention of grievances and claims.

Below are only a few of the ways for the estates lawyer to use Outlook and Amicus Attorney for achieving more peace of mind in your practice.

2. Using Microsoft Outlook as a Case Management Tool

Using Calendar View

- Jump to another day by clicking on that day in the monthly calendars at the top right of the screen. The right and left cursor will take you one day at a time in either direction.
- Drag over consecutive days on the monthly calendar and see 2 or more days at

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once.

- Make your default appointment length 1 hour (right click on the time column and pick 60 minutes) to see the entire day without scrolling.
- E-mail and Contacts are a click away on their respective icons on the Shortcut Bar (on the left side).
- Make the Outlook Shortcut bar narrower after you learn what the various buttons were. Leave part of the button labels visible to see enough of the label to differentiate similar types of folders.

Points re E-mail

- Create rules for forwarding, moving to another folder, deleting, copying etc. incoming or outgoing e-mail messages. To automatically keep a copy of all messages sent to clients, do the following: Always include in the e-mail message a unique string of text (e.g. "cc client file") and create a rule that always puts a copy of a message that contains this text in the appropriate folder. Create a rule that automatically moves messages from a list serve into a separate folder. This can help you keep the number of messages in your inbox to a reasonable number.

Outlook can be networked or used by itself and costs only about \$100.

3. Using Amicus Attorney as a Case/Practice Management Tool

Being Reminded

- Amicus Attorney will prompt you if you haven't opened a file in a user-selected time period – to ensure that you are continually bringing in new business.
- Amicus Attorney will remind you to call a client according to a user-defined time period – ensuring that you keep in touch with all of your clients.
- Amicus Attorney will prompt you if you haven't looked at your "To Do Someday" list – reminding you that there is a bigger forest if you get lost in the trees...
- Amicus Attorney will remind you if your regular "to-do" list is getting too long – you need help or you need to delegate some of your work to others.
- Amicus Attorney will remind you if you have missed any deadline dates or have gone over-budget in terms of billable time on a file.
- The "Dailies" feature allows you to take a moment and answer the question: "What's going on today?" This feature provides you with an overview of your practice, your firm, the legal community and the world around you.

- At the start of your day Amicus Attorney goes through your system and prepares a report on things to which you need to pay attention. These practice reminders include items like:
 - today's critical events (those items tagged as “critical” in your calendar),
 - advice on managing your to-do list (if items are becoming a little stale),
 - reminders to make or post time entries (so your accounting system has an accurate snapshot of your billable time)
 - suggestions for business development and internal announcements from your system administrator.
 - You can go back to the “Dailies” at any time of the day to regain your perspective and gain a quick appreciation of your outstanding To-Do’s, unreturned telephone calls and emails and your daily appointments. This ensures that you don’t end the day without at least being reminded that you had to do something before you left!!

Date Calculator

- Amicus Attorney allows you to calculate the number of business days, calendar days, weeks, months and years before, after or between any day or set of dates.
- If a reminder falls on a weekend or statutory holiday, then you can pre-select if you want to see the reminder before, during or after the weekend or holiday – so that you never miss an important deadline.

Programs such as Amicus Attorney put you in the “cockpit” of your practice from where you can see and retrieve the important information of the day that enhances your service to clients.

Amicus Attorney can be networked or used by itself and costs about \$400.